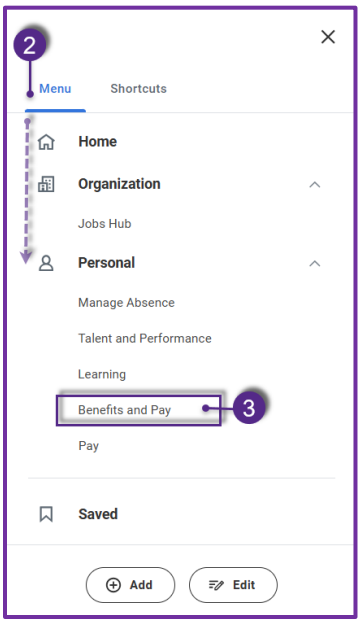
Purpose: This job aid provides instructions for the employees on how to modify benefits in Workday due to qualifying life events.

We'll begin by defining what qualifies as a life event, then guide you through the steps to access the Benefits application and make the necessary changes, including any required documentation. Effectively managing your benefits ensures a smooth transition through life's changes.

Qualifying Life Event (QLE)
Events such as a recent marriage, birth/adoption of a child, or even an address change are qualifying life events that allow for new benefit elections. A benefit event enables employees to add or modify benefit elections, plans, and coverage levels.

BENEFITS AND PAY HUB

1. From the login page, select **MENU (Global Navigation)**.
2. From the **Menu** tab.
3. Under the **Personal** section, click the **Benefits and Pay**.



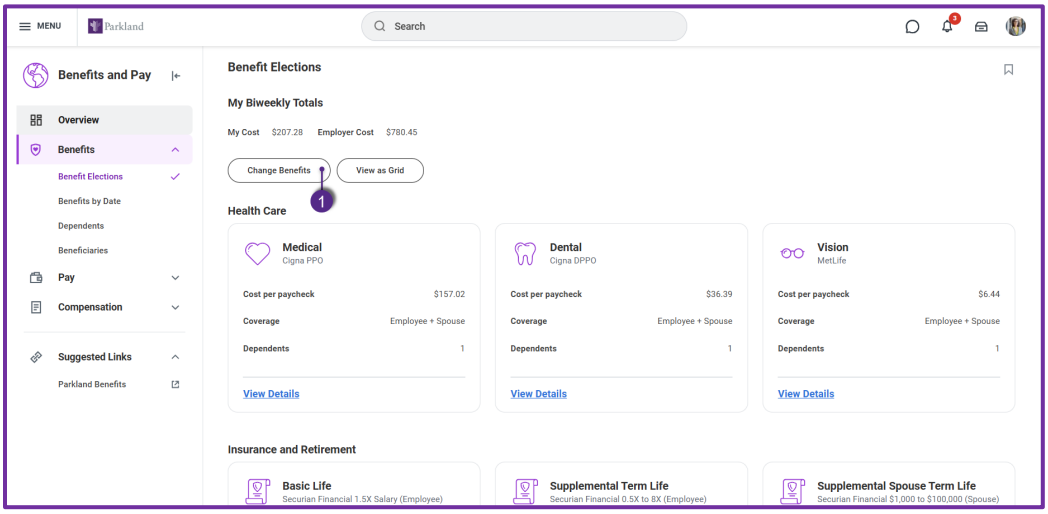
4. The **Benefits and Pay** page displays.
5. The sidebar houses five sections.
   - Overview
   - Benefits
   - Pay
   - Compensation
   - Suggested Links
6. Click the **Benefits** section, which expands housing into four sub-sections.
   - Benefit Elections
   - Benefits by Date

- Dependents
- Beneficiaries

7. Click **Benefit Elections** to view your benefits.

CHANGE BENEFITS FOR QLE

1. Click the **Change Benefits** button to submit a life event, located on the **Benefit Elections** page.

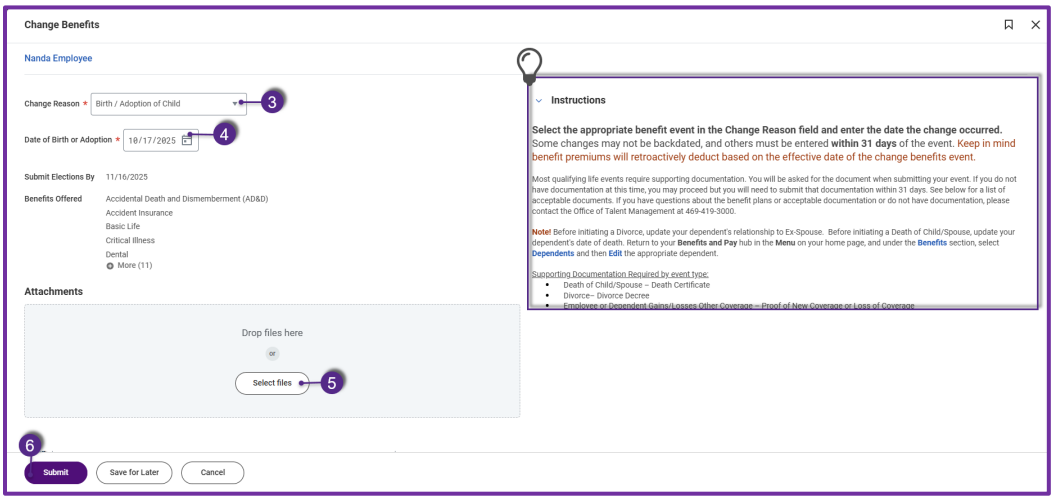


TIP: An alternative way to access Change Benefits is to go to in the Search Bar, enter Change Benefits, and select the Change Benefits task from the drop-down menu.

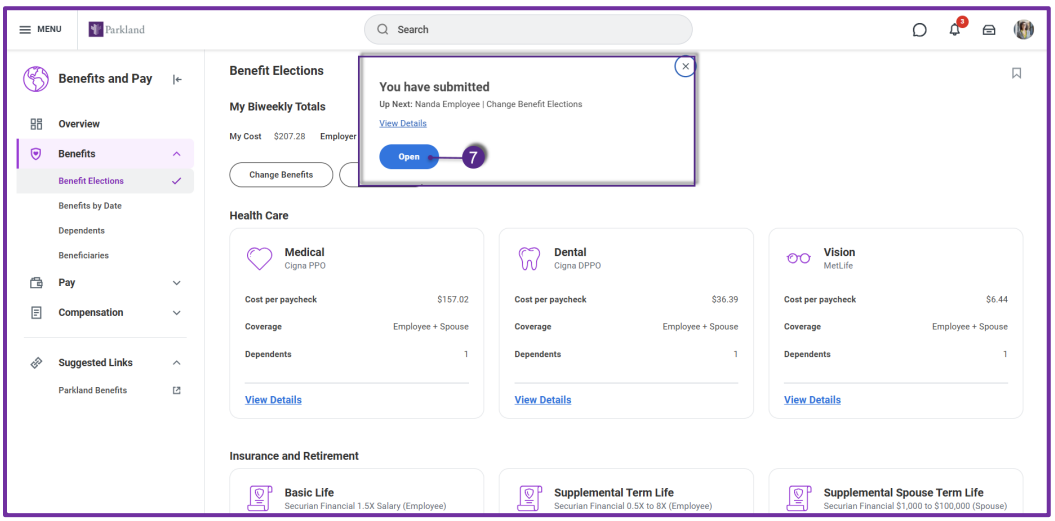
2. The **Change Benefits** page displays.
3. From the required **Change Reason** drop-down list. Select the purpose for the QLE.
   - Birth/Adoption of Child
   - Dependent Child Gains Other Coverage
   - Dependent Child Loses Other Coverage
   - Employee Gains Other Coverage
   - Employee Loses Other Coverage
   - Marriage
   - Spouse Gains Other Coverage
   - Spouse Loses Other Coverage
4. Click the **Calendar** icon to enter the **Benefit Event Date** in which the change occurred.
5. Attach the required documents, if applicable, by clicking the **Select Files** button or by dragging and dropping your files in the **Attachments** section.
6. Once selected, click the **Submit** button.

TIP:

- Read the Instructions noted to the right of the screen. On all reoccuring pages instructions will display. Review them to assist you in submittance of your benefit elections.
- After uploading the first document, clicking Upload will prompt you to select additional files if needed.
- If a required document is not uploaded, the system will notify you of the missing documents and prevent further progress until they are provided.
- You can also upload documents that are not required for the process, providing additional information, if necessary.

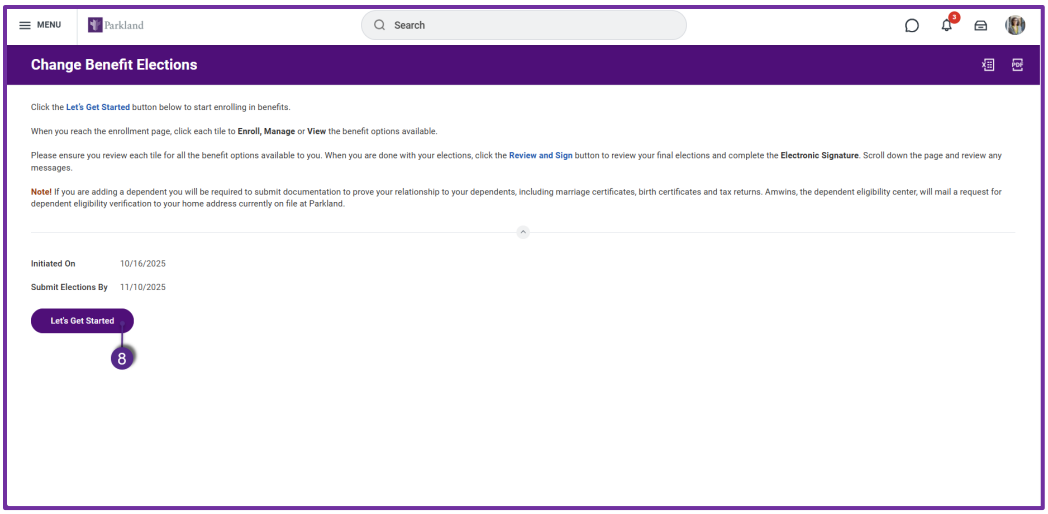


7. You have submitted. **Up Next: Change Benefits Elections** pop-up displays. Click the **Open** blue button to launch the **Change Benefits Elections** page.



8. From the **Change Benefits Elections** review the message and proceed to click the **Let's Get Started** button.

Change Benefits Qualifying Life Events

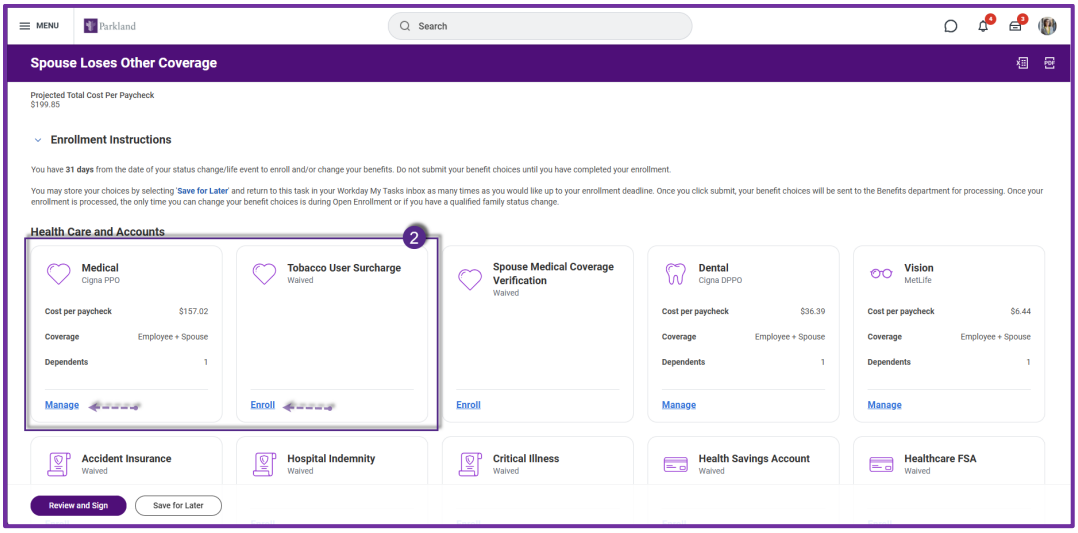


TIP:

- The Change Benefit Elections screen opens. Click the Let's Get Started button.
- You can also navigate to your My Tasks inbox and locate this task.
- The Benefit Election Enrollment page will display. From here, you can manage your current benefit elections or enroll in new benefit plans.
- When done with your elections, click the Review and Sign button to review final elections and complet the Electronic Signature.
- Enrollment Instructions: You have 31 days from your event date to complete the enrollment.

CHANGE BENEFITS ELECTIONS

1. The **Enrollment Instructions** are displayed at the top of the screen.
2. Click on the tiles that display **Manager** or **Enroll** hyperlink to make the changes.

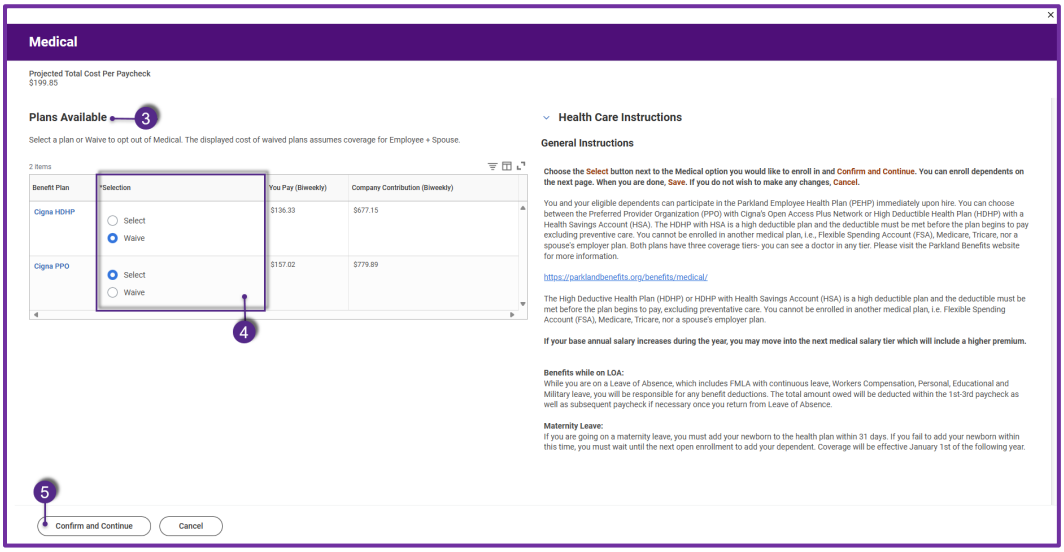


3. The benefits type page will be displayed under the **Plan Available**.

TIP: Health Care Instructions expands displaying general insturctions to assist in the completion of plans via the access of the Parkland Employee Health Plan (PEHP).

4. In the **Selection** column, click the **radio button** next to one of the options.
   - Select
   - Waive (To opt out of the benefit)
5. Click the **Confirm and Continue** button to proceed to the **Plans Available** section of your benefits election.

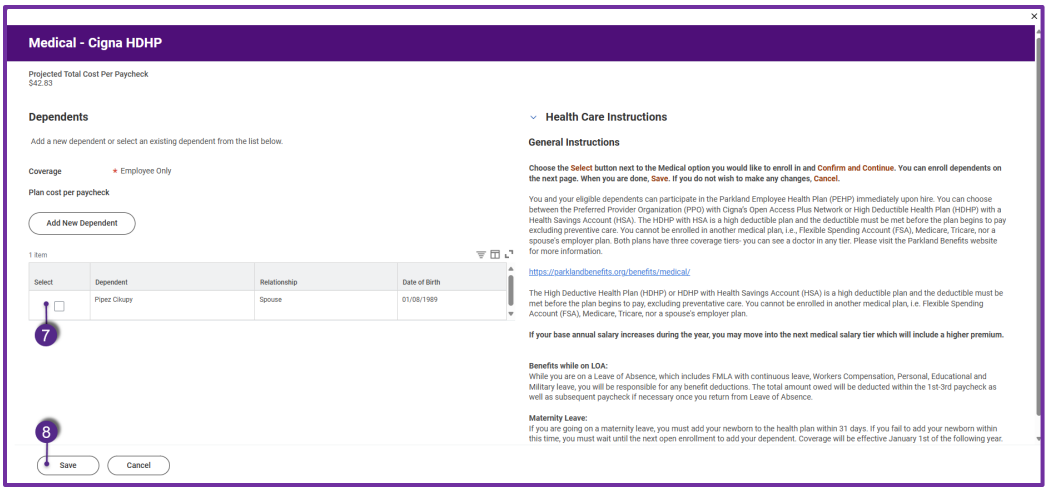
TIP:
- The Benefits plan will be noted as updated. Approval by the Benefit Partner may be required for enrollment to be finalized.



6. The coverage page displays.

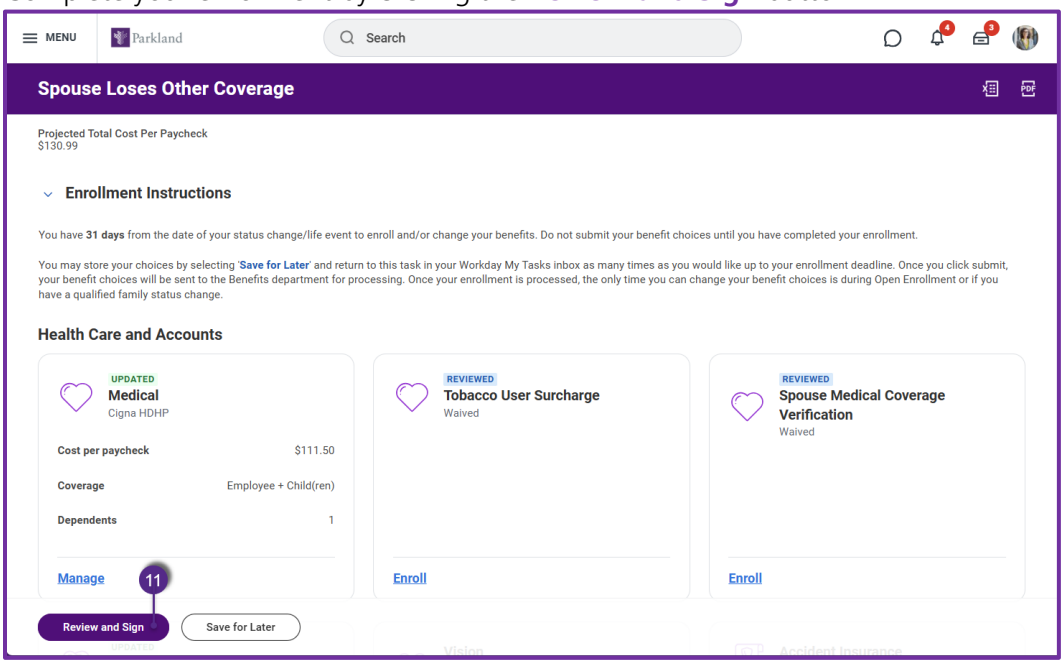
TIP: For detailed steps to when adding or editing a dependensee Manage Dependents Job Aid.

7. From the grid, the **Select** box will be unchecked. Apply check all applicable check boxes.
8. Click the **Save** button to move forward.



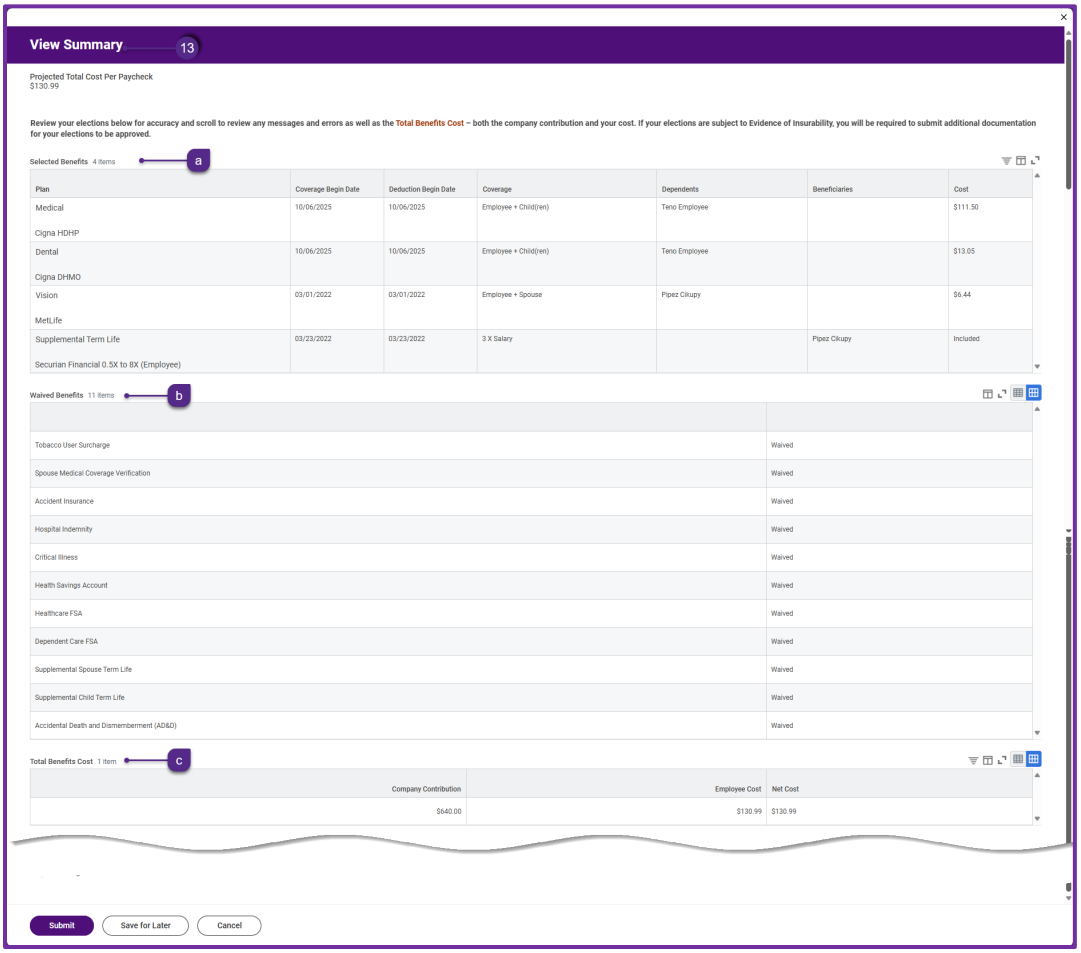
TIP: You have dependents covered under your health care plan without a Social Security Number. Enter their Social Security Number (SSN) or Reason SSN is Not Available if you don't have access to their number at this time.

9. The coverage page displays all appliable benefits tiles.
10. **Manage** or **Enroll** in applicable benefit tiles.
11. Complete your enrollment by clicking the **Review and Sign** button.



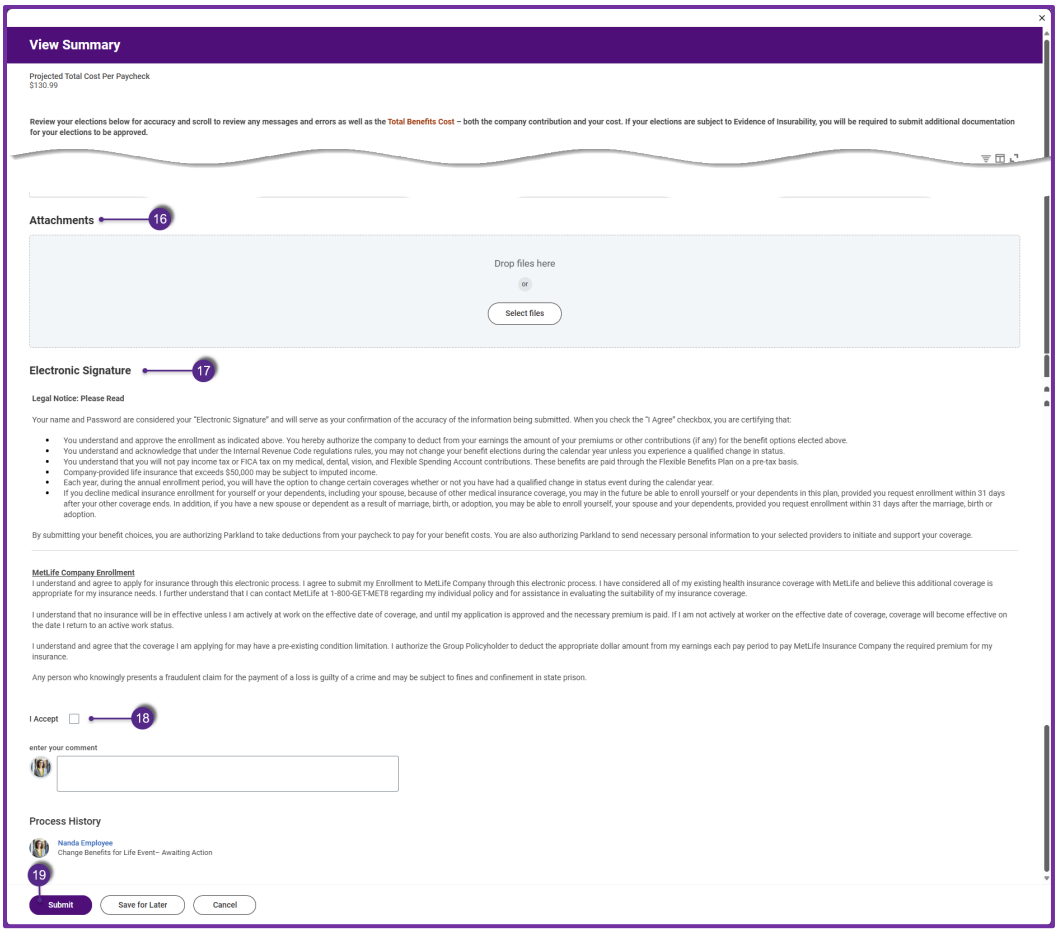
TIP: Pop-up displays **Your Medical changes have been updated, but not submitted** Next steps: Update another plan or click Review and Sign once you're ready to submit your changes.

12. The **View Summary** page displays all
    a. Selected Benefits
    b. Waived Benefits
    c. Total Benefits Costs

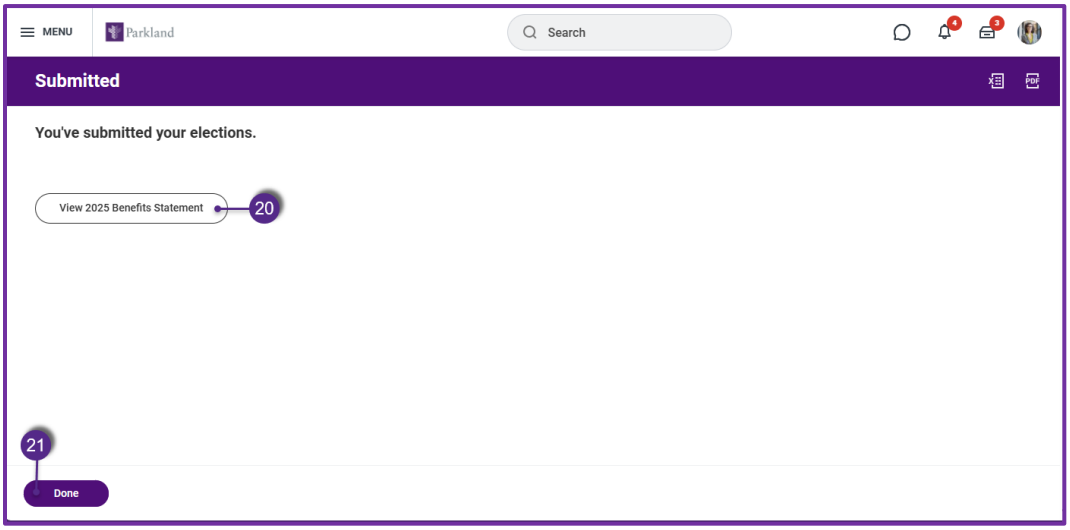


TIP: You can also click the Save for Later button at the bottom of the Open Enrollment page to complete your benefit elections later.

9. From the **Attachment** section click the Select files button to add any supporting documents.
10. Scroll down to the **Electronic Signature** section.
11. Click the **I Accept** checkbox.
12. Click the **Submit** button to complete and submit your benefit elections.



13. The **Submitted** screen confirms that your benefits election has been submitted. You can click **View <Year> Benefits Statement** to print a copy of your election for the benefit life event.
14. Click the **Done** button to return to the **Workday Homepage**.



If you need additional support, please email Learning@phhs.org